Requests for Additional Contract/Grant Project Numbers
Department Instructions
Issued 9/17/2023

<u>Background</u>: UCR uses Oracle Project Portfolio Management (PPM) for post award activities, such as budgeting, expenditures, and reporting on contracts and grants. Each Kuali Award issued by the Office of Research Sponsored Programs Administration is associated with a PPM Award; both share similar numbering; for example, Kuali Award <u>012345</u>-0001 would be associated with PPM Award K<u>012345</u>. Each PPM Award may have one to many related PPM Projects. The ten-character PPM Project code utilizes the PPM Award number as it's basis; for example, PPM Award K012345 would be associated with project <u>K012345</u>001, <u>K012345</u>002…<u>K012345</u>099. The PPM project is one element of the UCR Chart of Account (COA) GL chart string and the primary element in the PPM POETAF chart string. Distinct Projects will be created automatically by the Accounting Office for the following, there is no need to submit requests for these items:

- Main Prime PI (new awards will end in 001; awards converted from UCRFS may be numbered differently)
- Participant Support (next sequential project)
- Cost Share (ends in 099. Note: department must provide fund-activity-function-program code of cost sharing source via Kuali Build form)
- Program Income (formerly known as STIP; end in 098)
- Fabrications (ends in FXX and will be defined by General Accounting based on approved fabrication requests)
- Sponsored Capital Programs (starts with RV; note numbering is based on capital project numbering)
- Components subject to different Facilities and Administrative Rates than main award (next sequential project)
- Annual funding with no automatic carryforward to future years (next sequential project)

Projects may be created upon request from Prime PI's department for Kuali contract and grant sponsored awards under the following circumstances:

- ➢ Budget allocation to Co-Investigator(s) listed on the award documents
- ➢ New project under a different Project Organization (i.e., activity) under the Prime PI's home department on converted projects.
- ➢ <u>Major</u> elements of a sponsor award that must be separately tracked and reported

Requests for new Projects
1. Complete the attached form
   a. New Project Name should follow the following format Agency Award# + Project PI + Expiration Date + (plus "Participant Cost" or "Cost Share" or "Diversity as applicable) + Agency Name + Project Title (up until the field length limit is reached and reserving last 5 characters for uniqueness) + Last three of project number (to ensure uniqueness)

b. *Allocations to BC35 and BC36 are normally included in the primary project (typically project ending with 001) and will automatically sync with Oracle Budget and Oracle GL with the default activity for Undergrad and Grad Student Aid and function 78—no new project and function override is required in these scenarios*

2. The Prime PI's C&G analyst must prepare a reduction on the project working budget by the amount to be transferred to the new project and baseline it. Confirm the reduction is complete and provide version number. Note: converted project costs will not be able to be transferred to a new project, the budget adjustment should be based on the budget balance as of 6/30/2023

3. Specify the Function Code, if other than the award function default

   a. *Allocations to BC35 and BC36 are normally included in the primary project (typically project ending with 001) and will automatically sync with Oracle Budget and Oracle GL with the default activity for Undergrad and Grad Student Aid and function 78—no new project and function override is required in these scenarios*

4. Endorsement of the request by the Department Financial & Administrative Officer (FAO), and if required by the Organizational unit, endorsement of the Org CFAO

5. Email to EMF@ucr.edu using subject "Request for New Project-(Kuali Award #)"

6. Requests will be reviewed by the EMF Manager to coordinate the creation of new projects as appropriate.